

IN THE UNITED STATES DISTRICT COURT
FOR THE DISTRICT OF MONTANA
BILLINGS DIVISION

DONA MCLEOD

Plaintiff,

vs.

RELIANCE STANDARD LIFE
INSURANCE COMPANY, and JOHN
DOES 1-10,

Defendants.

CV 22-87-BLG-SPW-KLD

ORDER

On January 17, 2024, the Court held a hearing on Plaintiff's Motion to Compel Discovery From Defendant (Doc. 23) and Plaintiff's Motion to Extend Discovery Deadline (Doc. 27). For the reasons stated in open court:

IT IS HEREBY ORDERED that Plaintiff's Motion to Compel (Doc. 23) is GRANTED IN PART and DENIED IN PART as follows. Defendant is compelled to respond to the following discovery requests, as amended by the Court,

1. Request for Production No. 5: requiring production of all documents showing how Defendant either did or did not take an offset against insureds' retirement benefits under policy number LTD 130695, where such benefits were rolled over to an IRA, for the years 2019 to the present, and only for claims within the District of Montana.

2. Request for Production No. 6: requiring production of the total amount of money deducted from insureds' retirement benefits which were rolled over to an IRA under policy number LTD 130695, for the years 2019 to the present, and only for claims within the District of Montana.
3. Interrogatory No. 2: requiring identification, by name and address, of employees and/or agents who addressed whether Anthony Kenyon's retirement benefits, which were rolled over to an IRA, were subject to offset against his long-term disability benefits.

Plaintiff's Motion to Compel is denied as to all other discovery requests.

IT IS FURTHER ORDERED that Plaintiff's Motion to Extend the Discovery Deadline (Doc. 27) is granted. Defendant has 60 days in which to provide responses to these discovery requests.

IT IS FURTHER ORDERED that a status conference will be held, by Zoom, at 10:00 a.m. on March 21, 2024. The Clerk of Court will notify counsel via e-mail of the meeting ID and password in advance of the conference. Zoom Guidance and Setup available at: <https://www.mtd.uscourts.gov/zoom-hearings>.

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IT IS FURTHER ORDERED that the fully briefed motions deadline is extended to June 14, 2024.

DATED this 17th day of January, 2024.

A handwritten signature in blue ink, reading "Kathleen L. DeSoto", is positioned above a horizontal line. The signature is written in a cursive, flowing style.

Kathleen L. DeSoto
United States Magistrate Judge